



***The FUNdamentals of  
Arts Management***

**Fundraising Workshops  
Fall 2007**

**Companion Booklet  
Fundraising Tips & Resources**

## **Introduction and Overview**

The fundraising workshops and this booklet were designed to assist managers and board members of arts and cultural nonprofit organizations and public agencies raise funds for their very important programs and operations.

Fundraising is truly an art – and not a science. While there are tools you can utilize to maximize gifts, fundraising is first and foremost about building relationships and sharing a passion for your cause with philanthropically minded people. Fundraising gives donors an opportunity to participate in meaningful ways in a cause or organization they believe in. However, there are many worthwhile causes for them to support, and so when fundraising, those doing the asking should remember that no one is obligated to give to yours. It is a privilege to receive as well as to give.

It has been estimated by the Boston College Center on Wealth and Philanthropy that between 1998 and 2017, \$1.7 trillion in bequests will be received by charities nationally. While planned giving will be a topic of another seminar given by the Kansas Arts Commission, it is important for all nonprofit organizations in Kansas to understand the basic tenets of fundraising and ensure that they are in place. Fundraising is the main way most arts organizations will survive and thrive into the future. All of us want to see arts and culture thriving in all reaches of our state; it is the hope of the Kansas Arts Commission that organizations can raise the funds so that they can continue to serve their communities.

The Kansas Arts Commission would like to thank the Texas Commission on the Arts for generously allowing us to reprint, adapt and distribute material from its online Fundraising Toolkit. The complete Texas Toolkit can be found at <http://www.arts.state.tx.us/toolkit/fundraising/>.

This booklet is available for downloading and sharing on the Kansas Arts Commission's website (<http://arts.ks.gov>) under *Publications*.

The fall fundraising workshops are designed to give you a general introduction to fundraising basics, strategies and practices.

We encourage you to contact us after the workshop with any questions or concerns:

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## **Part I: Before You Begin:** **Fundraising Basics**

- **Fundraising and Development Basics**
- **Ten Principles of Fundraising**
- **Define Your Project and Strategy**
- **Make a Calendar**
- **Now You are Ready to Begin Fundraising**
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## **Fundraising and Development Basics**

### **What is the quickest, easiest way to fundraise for my organization?**

Securing the funding necessary to operate your organization is one of the most important and relentless parts of administering a nonprofit organization. While there are no magic answers, there are strategies to enhance your success, but it will require constant work by you, your staff and your board. Sorry, there is no easy answer to this one!

### **What is a fundraising plan?**

Your fundraising plan is your roadmap to raising the money you will need to accomplish your organization's programming and operations activities for a specific period of time. A successful plan will have a number of different strategies to reach the overall goal. You want to be careful not to become overly dependent upon any single source of funding, so diversification is the key to success.

### **The basic steps are:**

- **Identification/Assessment**
- **Cultivation**
- **Solicitation**
- **Stewardship**

The approach for each step will vary depending on which type of funding source you are developing, but they are always the basic steps of fundraising. Most people think the process ends with stewardship, but in truth, that should be where the process begins. The real goal is to build a partner, not just a funder. A partner is someone you can count on; a funder is not.

# **Ten Principles of Fundraising**

Remember that fundraising is simply getting people to be supportive of your organization. You do that through personal contact and by educating and involving them. The following are truths you should incorporate into whatever fundraising you do:

## **Never ask a stranger for money**

- People give to people and because of people.
- People who don't know you or your arts group probably will not give.

## **Cultivate before asking**

- Cultivate potential donors through special events, receptions, openings, opportunities to meet guest artists, ad hoc committees, advisory boards, memberships and membership benefits, support groups, etc.
- Only ask for a gift after you have informed and educated a prospective donor.

## **Think of the needs of the donor**

- Your need for money will not motivate a donor to give; your provision of service to meet clear community needs will.
- Find out what interests the donor has and think through how the donor will benefit by giving. A corporation, for example, may want visibility and an individual newly arrived in town may want opportunities to meet people.

## **Ask for support for what you need**

- Be sure you are sticking to your fundraising plan and are raising money for the things you need, not creating new things that sound more enticing to potential donors.
- You may need to practice and try different strategies for making the electric bill or the janitorial services sound enticing.

## **Personalize your solicitation**

- People give more and are more likely to give when asked in person.
- People give more the more personalized the approach. Personal calls raise more than phone calls. Phone calls raise more than letters. Personalized letters and handwritten notes raise more than form letters.

## **Raise money from the inside out**

- Start raising money by asking the board to give first.
- Ask any fundraising volunteers to give before they ask others to give.

## **Raise money from the top down**

- Ask your best large-gift prospects first.
- Large gifts set the pace and build confidence, excitement, and momentum.
- 75% to 95% of contributions come from 10 to 15% of donors (usually 50 to 100 people).

## **Make the case larger than the organization**

Show prospects how:

- They will benefit (through involvement, becoming "part of the family," special privileges of membership);
- Their children will benefit (through educational opportunities, children's programs);
- Their community will benefit (through economic development, community pride, enhanced quality of life); and
- The gift is an "investment" in the future (for the reasons above).

### **Develop a strategy you can accomplish**

- Aim for success. Don't overreach.
- Fundraising success builds community, donor, and volunteer confidence so you can ask again.
- Everyone wants to be associated with a winner.

### **Treasure your volunteer leadership**

- Good leaders are rare.
- Substantial money cannot be raised without good volunteer leaders.
- Don't take volunteer leaders for granted once they are involved.



## **Define Your Project and Strategy**

Identify the project you are seeking funding for and then set up your strategy.

Some considerations:

- **Who will be the target audience of your project?** Who will be impacted and in what way? These should be general categories like families with young children, senior citizens, incarcerated youth, etc.
- **Use this assessment to think about potential donors for your project.** Who has an interest in impacting your target audience? Foundation libraries have resources that let you research funders by their interest areas.
- **Make sure that your list is broad, including donors on a national, statewide, regional and local level.** Again, these should be general categories of partners like toys stores, grant-making foundations with an interest in arts and education, etc.
- **Establish a fundraising goal.** Use a project budget to show total anticipated expenses and the funds that you hope to raise against these expenses. Keep in mind that for most fundraising purposes, you will always want to show your project as a break-even proposition. Your organizational goal may be to surpass that break-even point and use the excess revenues as seed money for your next project, but if you show that on a budget, it appears that you have a lesser need for outside support.
- **Establish a fundraising strategy.** Use your list of potential donors divided by category (corporate, grant-making foundation, government, etc.) to create a strategy. Don't forget to include earned funds that will be generated through ticket sales, special events and concessions.

## **Make a Calendar**

**Once you have identified your potential donors, put your plan on a calendar.**

### **Individual Contributions (*most flexibility in terms of time frame*)**

Individuals in your community, particularly those with an interest in arts and/or education related events, will contribute to your event as well. These donors will need to be recognized in printed programs and advertisements for the contributions that they have made. You will also want to provide them with additional benefits relative to the size of their gift such as a small gift on their reserved seat before the performance, opportunities to meet the artists and staff following the performance or at a reception for the event. You should automatically put this person on your mailing list so they continue to remember you and your organization.

### **Public Funders (*time frame typically ranges from 3 to 12 months*)**

With government grant programs (city, county, state, federal), you typically apply far in advance of the project. Your first step is to identify the funding categories that might be a good match for your project and put those deadlines on a calendar. Once you have done your homework regarding their grant programs and have a nice synopsis of your proposed project, you can contact these institutions and solicit advice from the program officers. Listen to the advice they give, take notes, follow their advice and thank them for their help. You should automatically put the program officers on your mailing list so they continue to remember you and your organization.

### **Corporate/Business Contributions (*time frame typically ranges from 3 to 6 months*)**

Some corporations will sponsor/underwrite events in their community as a marketing tool. They will require a proposal format similar to the grant-making foundation, but few have official application forms. Of particular interest to sponsoring corporations will be the advertising and marketing benefits that they will get – listing in the program, on posters, in media advertisements, etc. The application process is often much shorter than that required by a foundation, but many corporations allocate their nonprofit contributions during a specific time of year (relevant to their own fiscal year). In some instances you can access this calendar information through your foundation library. You should automatically put anyone you speak with on your mailing list so they continue to remember you and your organization.

### **Corporate Foundations (*time frame typically ranges from 4 to 6 months*)**

There are many corporations that have affiliated foundations (example: ABC Corporation distributes their philanthropic dollars through the ABC Corporation Foundation). These applications should be treated as foundation proposals, following the appropriate guidelines and reporting procedures. Corporations with a large employee base in your community will be most willing to support your events. As with foundations, many corporate foundations take approximately four to six months to complete their application reviews, so this funding option should be pursued well before the scheduled arts event. You should automatically put the grant officer on your mailing list so they continue to remember you and your organization.

### **Private Foundations and Trusts (*time frame typically ranges from 4 to 6***

***months)***

There are many grant-making foundations that support events. Each foundation has its own specific funding profile (what/where it funds), application procedure (how it funds) and deadlines (when it funds). Be sure your organization and your event are both good matches for their areas of interest for funding. Applicants should contact foundations and request a guideline packet. Typically, applicants must be a 501(c)(3) nonprofit organization to be eligible.

Foundations usually require few marketing/advertising benefits but will require a final report/evaluation at the conclusion of the funded event. Many foundations take approximately four to six months to complete their application reviews so this funding option should be pursued well before the scheduled arts event. You should automatically put the grant officer on your mailing list so they continue to remember you and your organization.

***Fundraising Event (very small, intimate events can be planned in 3 to 4 months; most take 6 to 12 months of planning)***

You may choose to host a special event such as a luncheon, dinner or gala with proceeds going towards your upcoming event. This is a good way to generate some buzz for the event too. If you can get a celebrity there (the artist for the exhibit, the dancer for performance, etc), it will have a much better draw.

## **Now You Are Ready to Begin Fundraising**

Use these steps.

### **Identification/Assessment**

Use your general list of potential donor categories to identify specific targets, again at a local, regional, state and national level, that you can feasibly cultivate for this project. This means that they must fit within one of your potential donor categories and that their geographic focus and giving time frame must fit within your needs. It is also very helpful if they have some history of interest and/or giving to events like yours. Board members and current donors can be helpful in identifying these targets, particularly at an individual or corporate level. Look at who already gives to similar projects in your community.

### **Cultivation**

Potential donors become real donors through cultivation. As you build a relationship with them, they will begin to take an interest in and ownership of your organization and project. They must feel that they are involved in a collaboration and that their participation is crucial to success. Cultivation can happen in a variety of ways, depending on who you are trying to reach. A key component of all cultivation is the gathering and utilization of knowledge about the potential partner. Find out as much as you can about them as an individual, a corporation, a foundation, etc. and use this information to make a compelling connection between their interests and your project. People give to people, so the more personal you make the relationship, the more likely you will be to succeed.

### **Solicitation**

If you have done careful assessment and good cultivation, the actual solicitation (the "ask") should be easy. The way in which the solicitation occurs will vary depending upon the kind of donor you are asking; it can range from a formal written proposal to a personal, verbal invitation to "join the team." Make sure to utilize your board resources and other donors for this process.

### **Stewardship**

This is perhaps the most important part of fundraising and, properly done, will ensure that you create a consistent base of funding support, allowing you to build on the success of each event. Each donor will require and respond to different kinds of acknowledgement and thanks. It is important to identify these requirements early in the partnership and keep them at the forefront of everything that you do as you cultivate them. Be creative, sincere and as personal as you feel is appropriate. Partners need to feel that they are integral to the success of the project.

## **Mistakes to Avoid**

### **Don't forget to ask!**

The single most common mistake in fundraising is not asking for a gift. People are often uncomfortable asking for money, so they skirt the issue. People who are regularly approached for gifts know this! They will take your meeting, attend your lovely gala, enjoy a reception and go on their merry way, with checkbook intact unless someone says, "Bob, I'm giving a gift of \$5,000 to support this organization, and I was hoping you would match my gift with \$5,000 of your own."

### **Don't just ask for "a gift."**

When soliciting the gift, be sure to suggest a dollar amount. Do your research and ask around just before your meeting to be sure your prospect doesn't have an unexpected financial constraint, such as medical bills, divorce, etc. Figure out what amount would be appropriate to ask for. You want to include the amount you are asking for, or else Bob will write you a check for \$50, and you let a prospect worth \$5000 get off \$4950 light.

### **Don't say anything after you have made "the ask."**

It can be uncomfortable asking for a gift, and any donor is going to want a moment to ponder his or her response. It is one of those silences that feels like an eternity. Just sit tight and keep your mouth shut. Let them respond. Listen to what they say and continue based on that response.

### **Don't wait until the last minute.**

Start early—really, really early. Many funding processes take anywhere from three to 12 months to complete. You need time in advance to develop and describe your program well. If you do a slipshod job of that, you probably won't get any funding. So start the process early and write compelling and exciting descriptions of the proposed program, who it will serve and why you are the best organization to do this job. You sometimes need time to make personal contacts before applying too. Create a calendar of your future events with deadlines and timeframes for your most likely donors.

### **I've got my check; the process is done.**

Change your thinking about the process. Most organizations believe the process of fundraising is over the minute they get their check. That is the *beginning* of the process! You now have the opportunity to build a real partnership and lasting relationship with this donor, if you do your stewardship well. The power to leverage is yours if you use it creatively. Focus more time and energy on this aspect of the process, and you will reap the rewards. If it is corporate gift, offer a discounted night for their employees. This could lead to a matching gift program. Find out when their board meets (yes, the foundations, corporations and public funders all have board meetings too), and email your contact nice anecdotal information about the progress and success of the program a few days before. Send them handwritten letters from kids, heart-warming stories, photographs demonstrating the successes to date, etc. Don't wait until the end to send in your updates. You will create a partnership if you do this right.

### **Don't be a chameleon!**

Don't invent new programs in order to go after specific funding without carefully and honestly thinking it through. During the assessment phase, always, always consider how well this will fit with your mission. You can change the direction of your organization by inventing these new

programs. Over time they can consume your staff time and resources to a level where you can no longer achieve your original and true mission. The outside world may become less clear about who you are and what you do. Find funding for your programs! Skip the opportunities that aren't a good fit.

**Don't try to fundraise from the outside in.**

When building your base of support, your audience for your programs, and your funding, start with the people closest to you. Once you have them involved, move out to the next circle, and so on. Your first line of attack should be your board of directors. You should secure a significant gift from each member (it may vary from member to member). Once you have 100% of your board giving, you can expand to your patrons. These are the people who attend your events, volunteer in your office, and support what you are doing. These are the people you should target for your membership program. The same rule holds true with public funding; start with your city or county, expand to state opportunities and then federal. Foundation funding should start with foundations in your vicinity and move outward from there. An established audience is an essential part of demonstrating the need for your organization and its services. You may have to do some programming in order to build the audience that funders will support.

**Don't become too dependent on any one source or type of funding.**

A healthy budget is a diversified budget. You want to see as many of these income streams as possible. The more income sources supporting your organization, the less dependent you become on any one of them. Within each income source, strive for diversification as well. Don't put all of your eggs in one basket.

**Don't let your board shirk its fundraising responsibilities.**

Get your board to help. This requires work, and typically you will only have one or two members who will really go out and raise funds for you. These people should be your biggest supporters, best advocates, and have the connections to introduce you to funders.

**Don't forget to thank your funders. Again. Again. And again.**

You may think you acknowledge your funders, but chances are they think you could and should do it better. It is one of the easier things to do. Say thank you several different times and several different ways. Hand-written notes make a big impression. Some funders want a public acknowledgement, others want a more private and personal thanks, but they all want to feel appreciated. Spending more time on this and finding personalized and creative ways to show your appreciation is likely to pay off well in the future.

**Involve your donors in your organization.**

Once someone has given you a gift, you have an open-door invitation to involve them more in your organization. Significant donors tend to know other potential significant donors. If they feel they are a part of your organization, they are more likely to introduce you to their friends and colleagues. People give to people they know and because of people they know.

## **Part II: Creating a Fundraising Board**

- **Why Board Members Don't Like to Raise Money**
- **Tips to Build a Fundraising Board**

## **Why Board Members Don't Like to Raise Money**

The responsibility of a nonprofit board of directors to engage in fundraising is a frequent source of tension between nonprofit staff members and boards of directors. The staff often thinks the board members should do a better job of raising money for the organization and board members resist. Why? Here are some possible reasons for board resistance to raising money and some suggestions to help overcome the board's reluctance to ask for money.

### **Reciprocal Giving**

Board members are often asked to go through their address books and create a list of people who they are willing to ask for a contribution. While this seems like an excellent technique, it puts the board members into a position of the reciprocal ask. In other words, if you send a letter to John Smith asking for donation, the chances are high that John Smith will soon be asking you for a gift to his organization.

Although this is not a problem for board members who give to many organizations, it may be problem for people on a limited budget. Keep this in mind when asking your board members to solicit their friends.

### **Fear and Embarrassment**

Money is a sensitive subject. Asking other people for money, even for a well-deserving organization, is a difficult task. Although it is far from "begging," many people feel embarrassed to ask others for money.

Don't try to sweep this factor under the rug. If possible, arrange for a board training session where this issue can be put on the table and discussed.

Engage the board in the organization's fundraising planning. Just don't show up at a board meeting and tell people it's time to raise money. The more that board members know about the reasons for raising money, the better they will be able to do it.

### **"I Don't Know What to Do."**

Board members are volunteers. Like all volunteers, they will perform better if they are given clear instructions and goals. It's the job of staff or lead volunteers to make sure board members have the information and training they need to be effective fundraisers. Be supportive, provide plans and materials, and create realistic targets and goals.

### **"I Didn't Know I Was Expected to Raise Money."**

If you hear this statement from one of your board members, you have no one to blame but yourself. This is why a good orientation program for new members is important. Be sure that your expectations for fundraising are clearly stated when you recruit a new person to your board.



**Should Every Board Member Raise Money?**

Every board member should participate in fundraising to the extent of his or her ability. Everyone on your board of directors will not be wealthy and well connected and, in fact, they shouldn't be. It's important to have a board that represents your community and the stakeholders in your agency.

Although every board member will not be equally involved in fundraising, it is important that every board member make an annual personal gift to the organization. One-hundred percent participation in a board fundraising drive will signal to funders that your board cares about your organization.

## **Tips to Build a Fundraising Board**

### **Develop a road map:**

#### Strategic Planning

- provides a specific destination (goals/measurable outcomes)
- sets a specific ETA (timeline)
- identifies specific resources needed for the trip (strategies/budget)

*Strategic Planning provides the perfect opportunity for some to gracefully hop off the train...*

### **Define the role of the board:**

The transformation of volunteer board into a fundraising board is a process of maturation:

- Infancy: Hands-on volunteer/staff support
- Childhood: Some of the volunteers on board become donors
- Puberty: Core group begins to recruit newly interested donors/volunteers (second generation is born), and board begins to set giving expectations...though they are not consistently enforced
- Adolescence: Board begins to see the need to redefine itself (as the professionalism of the staff support increases)...the board discusses the changes taking place
- Adulthood: When asked what they do for the organization, the board members respond, "We raise funds and influence for our organization."

### **Write a board contract:**

- Develop the list of board commitments (with fundraising "give/get" level and other expectations)
- Develop a written commitment form to be signed annually by each board member
- Discuss the terms with each and every prospective board member

### **Mean it...**

- Board must be willing to "fire" board members who do not fulfill commitments
- Never allow a zero gift option...

### **Assess the current board:**

- Study the skill sets and assets of the current board and plot it on a chart to check for areas of strength and weakness
- Analyze the individuals by profession, gender, age and diversity and develop a wish list for types of expertise and talent desired to enhance the board
- Look to the strategic plan and decide if the challenges of the next three years can be met by the current board members themselves
- If not, add to the wish list...

### **Develop a STRONG nominating committee:**

- Present the board analysis to the Nominating Committee for its review
- Develop a working wish list of prospective candidates
- Identify the best member of the committee to cultivate each prospect
- Be diligent with research

### **Walk before you run/Grow as you go:**

- Your board will move from a hands-on board to a fundraising board over time
- The hands-on board stage is an important phase of development and organizational culture
- As the board commits to increase its commitments and giving, don't retreat!

### **Be careful what you wish for:**

The board of your dreams can be a nightmare if you aren't ready.

- The professional expectations of the fundraising board are high, with little tolerance for inefficiency from one another or the staff
- Make sure your staff members have the professional skills to support the board's efforts

### **Walk the Walk:**

- Set the pace and the standard through your professional conduct
- If at all possible, give at the level of your board
- Encourage your staff to value your organization through their giving
- Facilitate the process of increasing your staff members' professional skills while you are increasing the influence and affluence of your board

### **Remember that board members are to be cherished:**

- They don't have to choose your organization, and they can walk away
- They are your first donors. Don't look straight through your board when thanking donors
- Constantly ask yourself how staff can make it easier for your board to serve
- Make sure the e-mails and letters you ask them to send are crisp and to the point
- If you ask them to make a call, remember to include the number

### **As you move to the next level:**

- Don't leave your soul behind
- An organization should reach maturity with the best of the founding members intact
- Organizational maturation should not be a process of dumping out the old for the new, but a careful blending of the two
- The heart and soul of the organization resides in the passion of those who believed in your organization before it was the chic thing to do

### **Never forget them.**

## **Part III: Defining and Earning Through Different Income Streams**

- **Earned Income**
- **Income from Individuals**
- **Public Support**
- **Corporate Support**
- **Private Foundation Support**
- **Fundraising Events**
- **Ten Special Event Fundraising Tips**

## **Earned Income**

### **Funding received from ticket sales, box office sales, concessions, memberships, publications, space rental for events, workshop fees, tuition, etc.:**

- Outdoor events can be very susceptible to weather; you can purchase event insurance to ensure the rain doesn't dampen your organization's financial outlook.
- Balance your offerings throughout the season to ensure you have some box office favorites along with the lesser known/riskier/edgier work.
- Many organizations find it more cost-effective to contract with food/gift shop vendors rather than trying to do that business too.
- If your community draws tourists in any number, consider finding local artists who have work that could be sold in your gift shop on consignment. Tourists want authentic and unique local pieces as souvenirs.
- Many nonprofits offer classes and workshops to the community. Tuition from these classes should earn you income beyond the cost of the classes. The participants in these classes could be future members and patrons, so cultivate them too!
- If you don't have a membership program in place, consider starting one. This can be a dependable source of funding and makes your supporters feel more connected to your organization.
- If you have a space that could be rented to the public for events, consider developing or expanding that as an income source. It may not be a space for wedding, but for business meetings, or other kinds of gatherings. It may be worth a small investment in decorating, planting, and marketing in order to realize funding. Do get legal advice on your rental contracts (Mid-America Arts Resources or the Kansas City Volunteer Lawyers and Accountants for the Arts can help) and insurance requirements.

### **Interest on investments or an endowment:**

- These are almost magic dollars once you have them in place, but fluctuate with the stock market, so be sure your portfolio is diversified.
- These are some of the harder dollars to secure, but are "almost magic," so often are worth the trouble.

If you are launching a capital campaign, consider including an endowment campaign to help operate the new facility. Some groups have had greater success integrating the two campaigns into one building campaign. Donors give to the new building: 60% of their gift goes to bricks and mortar and 40% goes to the endowment fund. It is usually easier to find donors for a building fund because of the naming opportunities.

## **Income from Individuals**

### **Funding received from gifts, memberships, services, or other types of support.**

#### **➤ Individuals typically account for 77% of all fundraising dollars.**

- Individuals who give frequently and repeatedly – even in small amounts – already feel ownership of your organization. They are enormously important to your future success. It is easy to overlook these people and focus on major donors, but these individuals are the cornerstone of your organization. Their small gifts can be some of your more reliable and consistent funding. These people are your board members, docents and volunteers, patrons, people who take your classes or attend your workshops or lectures; they are the consumers of your services.
- Maintaining the ownership of these people requires regular and reliable contact. You need to constantly try to assess why they care about your organization, what they get from you that they perceive as a value, and how you can expand those services. They need to feel included and important. They need to feel their \$30 a year is important and appreciated.
- Gifts of time or professional services can help you match other funders' dollars; these are called in-kind donations. Documenting these gifts is not very difficult or time consuming. In addition to enhanced matching capabilities, in-kind donations demonstrate to funders that people in your community value your organization:
  - Have volunteers sign in and out and track their time. Calculate those hours at minimum wage for in-kind contributions or for the Kansas Arts Commission for Fiscal Year 2009, you may calculate their time contributed at the rate of \$18.77 per hour
  - For services from professionals, have them provide you with a note on their letterhead stating what service they performed and the amount they would typically charge for that service. Board members providing you with their professional service can provide you a letter documenting their donation. However, you calculate a board member's time while for volunteering for your board or committee by the minimum wage. For example: Your board member Sue, who is an accountant, can give you a letter showing that her work in preparing your financial paperwork took 10 hours at her going rate of \$125 per hour. You then have an in-kind donation of \$1,250. Her time volunteering to serve as an usher at one of your events is calculated at the minimum wage rate (or, for the KAC, at \$18.77 per hour).

- For discounted services, you can again get a note on letterhead stating that the company would typically charge \$2,000 for a day rental, but are giving you a discounted rate of \$500. You can then calculate an in-kind donation of \$1500 in space rental.

## **When Soliciting an Individual**

### **Make an appointment to ask for the money face-to-face.**

- Solicit gifts in a thoughtful manner, not casually.
- Do not solicit by phone or letter if you are asking for a significant gift.

### **Prepare your case, briefly and to the point.**

- Know as much about the prospect as possible (see the **Donor Profile Template** in the template section).
- Be clear about the amount of money you are requesting.
- Have a personalized letter with you that asks for a specific amount or range, a pledge form, and select support materials for the fund or the organization (see **Sample Pledge Form** in the template section).

### **Be confident and positive.**

- You are not begging; you are sharing an opportunity to enhance your organization and to satisfy the prospect's need.

### **Focus on the prospect's needs, not your own.**

- Successful fundraising speaks as much to the needs of the donor as it does to the organization's needs.

### **Ask for a specific amount of money.**

Near the beginning of the visit:

- Mention the opportunity – focus on the need or goal you believe will be most interesting to your prospect (based on your research), and let your prospect know you researched him/her – it's flattering.
- Lead with your strongest opportunity. Don't mention others unless they turn this one down.

### **Do not fill the silence after you make the request.**

- Give the prospect a chance to respond and then continue based on the response.
- Involve the potential donor in the development and creation of the ideal proposal so the donor is emotionally involved in its success.

### **You can mention that the amount requested may be high or low.**

- It is only a suggestion.
- Only the prospect knows the appropriate gift level.

### **Say "thank you" and follow up with a thank-you letter.**

- Even if the prospect turns you down.
  - In fact, thank donors every time you can.
  - Saying thank you gives you the right to ask again.
- **Involve the donor in the organization and turn the contribution into an annual gift.**



## **Public Support**

**Funding received from the government, including hotel-motel occupancy or bed tax, other city, county, state, regional, and national funding and support.**

➤ **Government funds typically account for 8% of all fundraising and earned dollars of arts organizations.**

- These are typically competitive dollars, so you may do better some cycles than others. In some rare instances, these funds are dedicated to a particular organization at a particular sum and can be reasonably assured.
- These are funds that go under regular public scrutiny and often require justification and protection. Because of this, they often fluctuate. It is important to stay abreast of the issues impacting these funds and to participate actively in advocating continuation of these funds.
- Because these are public funds, the process for distribution is sometimes called into question. These can be heated and drawn-out processes, which again, can cause fluctuation.
- Many organizations forget to consider support they may receive from government organizations beyond grants, but hardly any nonprofit could survive without them. These range from your exemption on taxes to the charitable giving laws that provide an incentive for your donors to give you funding, to such things as city-operated facilities or land leased from the city with landscaping services. These government organizations are constantly working to preserve and protect these laws and represent nonprofits in the public policy arena.

**Public funders have grant programs that may be appropriate for arts organizations:**

### **LOCAL**

Check with your city or county government

### **STATE**

Kansas Arts Commission  
Kansas Department of Commerce  
Kansas Grants Clearing House  
Kansas Health Foundation  
Kansas Humanities Council  
Kansas State Historical Society

**FEDERAL**

Institute of Museum and Library Services

National Endowment for the Arts

National Endowment for the Humanities

National Park Service

National Trust for Historic Preservation

Preserve America

U.S. Department of Education

U.S. Forest Service

## **Corporate Support**

**Funding or donations of good and services received through a corporation.**

➤ **Corporations typically account for 10% of all fundraising dollars.**

**The four primary types of support are:**

- **Philanthropic Gifts**

Tax-deductible as charitable deductions, these come out of the “contributions” budget and sometimes involve a separate corporate foundation.

- **Sponsorships and Advertising**

These are often, but not always, considered marketing expenses and can come out of budgets other than for contributions. They are sought through the marketing, community relations, or public relations departments.

- **Employee Matching Gifts**

Some corporations offer programs to match the gifts their employees make to nonprofits. Others have a restricted matching gift program. Such funds come out of the contributions budget.

- **In-kind Contributions**

These are gifts of goods and services such as paper, printing, mailing your newsletter, office furniture and equipment, graphic design work, computer help, accounting services, space, office supplies, loaned services and employees, food, lumber, hotel rooms, or rental cars for visiting artists. The expenses associated with these gifts are tax-deductible as part of the normal course of doing business, and this is often the easiest type of corporate support to attract. In-kind gifts can often lead to future cash gifts. *(For information on calculating in-kind contributions, go to **Individual Giving**.)*

### **What are the differences between approaching local businesses and major corporations?**

Motivation. Cultivation and solicitation of locally-owned businesses is similar in approach to raising money from individuals. These people tend to be well rooted in the community and want to show their support, within their means. The approach for national corporations with plants or branches in your area will be different because the motives for giving will be different. You may find that the managers or decision makers are new to your community. They will be considering whether your project will make them look good to the community, to their corporate headquarters, and if it falls within the guidelines.

### **Corporate giving and decision powers are segmented with each corporation.**

The structure will typically mirror the internal organizational structure, which isn't readily apparent to people outside of the corporation. There are pockets of money designated to different divisions, communities and stores. Most corporations will have:

Store managers who can make small donations to nonprofits in the community; sometimes they are restricted to giving products or gift certificates. These decisions are usually made on a monthly or bi-monthly basis and will be between \$50 and \$2,000.

Corporate offices who will have pots of money assigned to various divisions, often by city. These are bigger dollars and typically are slated for a particular purpose (encouraging the Hispanic population to buy their service). In order to get these dollars, you will have to prove to them, for instance, that you can provide them with entrée to that audience. You will need strong and convincing demographic data on those people and your ability to sway them. The process for receiving major gifts within this structure can be prolonged because several divisions will have to contribute to your one proposal. Be ready to do your sales pitch multiple times and to wait a little longer.

### **An insider is the best approach to finding your corporate funding.**

The key to a successful corporate fundraising campaign is identifying, cultivating, and involving the key decision makers so that they will want to help you get money from the corporations that they work for. Enable them to help you determine the best strategy for approaching the corporation and deciding what the appropriate request should be.

### **The days of corporate philanthropy are largely gone; now you have to sell something.**

Corporations don't have large amounts of discretionary dollars these days. Most of the funding they give nonprofits is essentially marketing and/or public relations money. So, you will have to provide demographic data on your audience in order to secure those funds. In most instances, you are providing them with either:

- Access to an audience they are targeting, or
- A way to elevate their public image by associating with your organization.

### **Some corporations have foundations. Is there a difference between them and the branches?**

Yes. Corporate foundations are patterned after private foundations and will typically publish guidelines, application forms, preferred form of contact, etc. The foundation gifts are usually restricted to specific geographic areas and focus on a couple of issue areas. Proposals outside of the scope of giving are nearly always a waste of time. The decisions are made by the board, usually on a quarterly basis. Corporations that donate larger quantities of product often distribute those goods through the foundation. Again, these donations tend to be restricted to specific geographic areas and focus on a couple of issue areas, so read the guidelines.

### **How do sponsorships work?**

Corporations sponsor events for calculated reasons. They are looking to enhance their image, increase their visibility, connect their product or service with a positive image or a new audience, showcase their product in a high profile way, or sell their product. Less often, corporations will sponsor events as a means of entertaining high-profile clients or retaining talented staff.

### **Why do so many sponsorships with nonprofits fail or not recur?**

Sponsorships are paid for from marketing budgets. Those people are trained to look for the ROI (return on investment). They track the effectiveness of what they are buying and how it is

impacting their sales. Nonprofits don't think in this way. The most important aspect of maintaining these relationships is to determine what the nonprofit can implement beforehand to help the corporation monitor their success. Be ready to survey the audience, track zip codes and more to ensure the corporation feels their participation was a good value. Establish who will do what beforehand and then follow through.

## **Private Foundation Support**

### **Funding received from private foundations and trusts.**

#### **➤ Private foundations typically account for 5% of all fundraising dollars.**

- Private foundations and trusts may be either professionally run or a family affair. Professionally run private foundations, employ grant officers are professionals within the world of philanthropy. Family-operated foundations, typically means the decision-making process takes place within a family structure.
- When working with a family operated foundation, it is usually important to have a family member's ear and support. Sending unsolicited proposals to foundations is usually an effort in futility and disappointment. This is one of the places your board can help you. Their connections with foundation board members can provide you with entrée to the foundation. You will need to maintain and advance that association, as your board member will move on.
- The best way to research foundations is through the Kansas Non Profit Association's *Directory of Kansas Foundations* (<http://www.mainstreaminc.net/knpa/>). The *Directory* is searchable by alphabetical listing of all included organizations, by alphabetical listing of foundations by city, and by alphabetical listing of foundations by funding priority (arts, education, health, etc.).

## **Fundraising Events**

### **Funding received from holding a benefit, gala, or other fundraising event.**

- Fundraising benefits always sound like an easy way to make a lot of money in a short period of time. In actuality, they are often a tremendous amount of work for very little return. Why? Because benefits cost money to put on and often yield very little after all the bills are paid. The impressive amounts of dollars raised you hear announced at the end of the night at these events are typically before the bills.
- Typically there is a committee of volunteers that plans the benefit, perhaps secures items for an auction, plans the entertainment, rents a facility, determines the food and drink, sets the theme for the decorations and flowers, designs the invitations, helps create the guest list, and creates the needed buzz for the event. Often the committee will set the ticket prices, project the income, and often in its enthusiasm overlooks some of the costs involved and all the staff time. You can do successful fundraisers, but they typically require strong leadership from the staff and a tight reign on the budget.

### **Some questions to consider when planning a special event or fundraiser:**

- Does the event say, “This is who we are?”
- What is the purpose of the event? Is it to brand the organization, introduce the organization to potential donors, or is there a monetary goal?
- Is the amount of work required to present the event balanced by the payoff? (financial, new donors, thanking donors, thanking volunteers, etc.)
- Is the event fun and celebratory?
- Will the event you have planned be interesting for everyone? If not, will it draw a large enough audience to raise money?
- Will the event act as an empowerment tool for the participants? Will it make members of your audience feel as if they can get involved if they want to, and on their own?
- Are you spending too much time soliciting donations for smaller items when you can be soliciting major donors for large contributions?
- Will the feelings you get from the event outlive the event itself?
- Have you considered the appropriate technology and scale? Are you able to execute the event you have chosen?
- Can you identify an underwriter to cover a significant portion of the costs so that funds raised support your cause?
- Does the event leave the opportunity open for good future events?
- When is the best time for the event?
- Is the ticket price reasonable for your audience? Is the ticket price comparable to similar events presented by other organizations in your area?
- Will the event raise enough to make it worthwhile?
- Will you be able to answer the question, “Why are you doing this event?”
- Is the leadership of your organization in agreement with your idea and the plans?

## **Ten Special Event Fundraising Tips**

1. Find a time of the year that works for your event and stick to it.
2. Never have a membership campaign going at the same time as your special event unless you can incorporate it somehow.
3. Do it well, or don't do it at all. Poorly done events create problems and ill feelings.
4. Local business is hesitant to give cash to a new event, but will support it with in-kind gifts. When the event has a proven track record, businesses are more likely to give cash.
5. Maximize the number of ways during the event that you can make money.
6. Always have a way of capturing the names and addresses of everyone who comes to the event and those who help out with the event.
7. Create a timeline for the event, then double it when planning for it.
8. Set a dollar goal that the event will earn, and stick to it. You are aiming for the amount of money earned after expenses, so keep expenses to a minimum.
9. Figure out how many volunteers you will need to make the event work and then double or triple that number.
10. Make sure that your event is fun!



## **Part IV: Getting Organized**

- **Getting Organized for Fundraising**
- **When Putting Together a Proposal**

## **Getting Organized for Fundraising**

There are a number of basic items you will want to have on hand for all your fundraising and development projects. You should keep these items electronically or in files, depending on the source. Once they are set up, it is easy to keep them updated, and regular grant deadlines won't take as much work to complete.

### **Paper files:**

- Copies of your IRS letter declaring your 501(c)3 status. If your copy is more than 10 years old, you should ask the IRS to reissue the letter. Never send your original.
- Copies of newspaper articles on your programs or events. Organize these files chronologically by event. It is worth spending a little extra time with a copy machine, scissors, and some white-out to make nice looking copies. Try to fit the whole article on a page and hide column breaks. Be sure to include the newspaper name and date on the page either typed or from the paper (not handwritten). This is a great job for a detail-oriented volunteer.
- Left over copies of your printed materials developed for your programs. Organize these files chronologically by event. (Be sure to save at least three originals in your archive file for the program.)
- Bound copies of your organizations audit (if applicable).
- Nice copies of handwritten letters from kids or teachers.

### **Electronic files:**

- Your mission statement.
- A short history of the organization (two versions: a one page, and a three-page version with bullets delineating major accomplishments and achievements).
- Your current board of directors list, including officers and ex-officio members. This is best kept in a spreadsheet with each person's name, contact information and occupation. That way you can provide just the information requested by the funder.
- A list of your programs. This is best kept in a spreadsheet and should include the date, name of the event, location of the event, type of event (i.e., exhibition, performance, teacher in-service, lecture, educational outreach), a brief description of the event, the number of audience members or participants, and possibly the characteristics of the audience (i.e., elderly, 2nd graders, title one school children, vision impaired, etc.). You can then use the information in the spreadsheet to help you make particular cases (i.e., we do extensive outreach to the elderly in our area) or to generally demonstrate your capability and track record.
- Select quotes from evaluations, letters and other sources. These are best when attributed,

but can be “from a 5th grade student from Jones Elementary, Smithville ISD.” Be sure to put the quotes in context (i.e., quotes from teachers at the June 12, 2004, in-service on integrating art and science). A couple of pages of these can make your case better than you ever could.

- A spreadsheet of schools and school districts served (with specific participants and event dates).
- A spreadsheet of other nonprofit educational, civic or community organizations with whom you have done collaborative programming. Again, you will want to include dates, the program or event name, and a brief description of how you worked together. You can use this to demonstrate how you work within the community.
- Your case statement for the reason why your organization exists and is important to your community. Be sure to include as many statistics as you can about the specific audiences you serve. This would be part of your general organizational fundraising proposals.
- Your case statement for any program for which you plan on fundraising. Be sure to include as many statistics as you can about the specific goal you plan on reaching and how, as well as any past track record in serving this group or similar group.
- Your organizations budget and one copy of your most recent 990 (never send a copy of a 990 unless requested).
- A spreadsheet where you list major gifts only (if you don’t already have this ability with your fundraising tracking system).
- A spreadsheet where you list pledges and donation by project (if you don’t already have this ability with your fundraising tracking system). You can create a list of donors with amounts for the specific program for which you are raising funds.
- Sample letters: cover letter, follow-up or update, thank you for the meeting, thank you for the gift, etc.
- Sample budgets for types of projects (at least keep a list of the main categories). Most funders don’t want to see every paper clip included in the budget, but do want to see some breakdown on fees to artists, rental fees, staff costs, etc.

A spreadsheet of your current and past board members and major individual supporters with contact information, occupation/employer, name of spouse/partner, term, and a note field to describe current relationship, introductions made, etc. This is a tool you can use in the Foundation Library to help you figure out where you may be able to make a connection. Foundation Directories list the trustees of each foundation in an alphabetical index. You may find some of your board member and their spouses sit on these boards.

## **When Putting Together a Proposal**

These materials can be used when approaching corporations or businesses for support. Before you apply, be sure that you establish a relationship with them and find out their funding timeline. Make sure that it fits the timeline and needs of your project. You should know whether or not the corporation has a formal application process or a form that you must use.

Remember to include the following components in your proposal:

- **Cover letter** – This letter should introduce the proposal and include the specific request amount.
- **Application** – If the corporation or business requires a formal application, complete it according to the directions. Call and ask for assistance if you have questions.
- **Informal proposal** – If no formal application is requested, your proposal should have the following components:
  - **Summary** – How much you want and how you will spend it. This may be included in your cover letter.
  - **Problem statement** – The issues, problems, or interests the project will address. Substantiate the need or intent if possible, with data or documentation.
  - **Qualifications** – Your organization’s qualifications for accomplishing the work.
  - **Funding sources** – Other funding for the project and how the effort will continue after the grant funds run out.
  - **Funder benefits** – How this project fulfills the funders needs, for example, how it meets the funders goals, makes a corporation visible, or given employees an opportunity to participate.
  - **Evaluation** – How you will evaluate the success of the effort, including methods and who will be involved.
  - **Budget** – A carefully crafted component that reflects all funds and expenditures for the project with in-kind donations footnoted and assigned a dollar value.
- **Attachments** – Include any attachments that are requested.
- **Collateral materials** – Publications related to your organization and/or the project.
- **IRS letter** – Always include your IRS letter of determination.

**After you secure a commitment:**

When you have been successful in securing a commitment from a corporation or business for funds for a particular event or activity or for the general operating expenses of your organization, be sure you follow up with the following:

- **An official pledge or commitment form.** In this letter you should acknowledge the amount of money promised by the funder and anything that your organization is committed to do in return for the support. Many times the funder will provide this, but if they don't you should create it.
- **A thank you and confirmation.** Send a letter that can be utilized by the corporation for tax purposes and thank them for the support. Remember, you cannot thank your funders enough.

**Ready, Set, Go!**

## **Part V: Fundraising Samples and**

### **Research and Planning**

- **Research Checklist Template**
- **Sample Fundraising Plan**
- **Fundraising Plan Template**
- **Donor Profile Template**

### **Forms for Financial Support**

- **Sample Contribution Pledge Form**
- **Membership Card Template**

### **Communicating with Donors**

- **Sample Benefits for Underwriters**
- **Sample Cover Letter**
- **Sample Follow Up Letter**
- **Sample Thank You Letter**
- **Sample Proposal**
- **Sample Budget**

### **Events**

- **Fundraising Events Template**
- **Special Events Timeline**

## **Research Checklist Template**

Directing a proposal only to the most appropriate funding entity is your first responsibility. Be sure you can explain exactly why you've selected a particular foundation or corporation that you plan to approach.

### **What Are You Looking For?**

Give some thought to all aspects of your program. Do research based on a realistic appraisal of the type of funder that will most likely to be interested in your project. Ask yourself the following questions:

1. What is the major concern of your organization?
2. What additional areas are you involved in?
3. What is the main focus of this particular proposal?
4. What related areas does the proposal deal with?
5. What population groups are served by your organization?
6. What population groups will benefit from this proposed project?
7. What type of support are you seeking (i.e., general purpose, building funds, etc.)?
8. What geographic area will be served by the project?
9. Will the project have any impact beyond the community where it will be operated?
10. How much money will the project cost in total?
11. Do any of my board members, volunteers or staff know staff, trustees or other individuals at a corporation or foundation?
12. What are the major foundations or corporations located in the immediate region?



## **Sample Fundraising Plan**

### **Capital City Dance Company 2004-2008**

**Strategic Plan Goal:** *To Increase Contributed Income by 84% from \$107,100 to \$197,500*

#### **Board Solicitation:**

##### **Plan and Rationale:**

Our 18 board members have been pushed hard to give to their maximum over the last five years. They have given to the annual fund drive and capital campaign. There is little room for improved giving. Each board member is required to give to the best of his/her ability.

##### **Strategy:**

Continue to have the Chair solicit the Executive Committee members and to have the Executive Committee members solicit the other board members. All solicitations will be made in person.

##### **Staff Time:**

Executive Director:	5 hours to help with prospect research
Administrative Assistant:	10 hours

##### **Board Time:**

Chair:	6 hours
Executive Committee Members:	4 hours each

##### **Direct Cost:**

Minimal

##### **Timetable:**

Board solicitation is to be completed within the month of September.

<b>Projected Income:</b>	<u>2004-05</u>	<u>2005-06</u>	<u>2006-07</u>	<u>2007-08</u>
	\$37,100	\$38,200	\$39,000	\$40,000

#### **Individual Gift Solicitation:**

##### **Plan and Rationale:**

Our board and staff do not have a lot of experience raising money from individuals. The plan is to start small and build on a strong base.

##### **Strategy:**

Develop a membership program where individual donors receive special privileges or benefits at different levels of giving. Memberships will range from \$35 to 51,000 annually.

##### **➤ Rolodex Fundraising:**

Start personal solicitation of gifts from individuals.

- Establish a 7-8 member Individual Gifts Committee. The committee chair calls each board member and receives 15 names of individuals whom the board members feel are capable of gifts of \$100 a year or more.
- Staff compiles the 270 names in an alphabetical list and eliminates duplicates.
- The committee rates and screens the list to focus on the 80 most-likely prospects (the others are put on the mailing list). The committee determines who is best to cultivate and solicit these prospects. Utilize board members as much as possible.
- The prospects are personally invited by the "best" person to attend a performance and private reception afterwards. The following week, prospects are solicited (gift range of \$100 - \$1,000) to become high-level members.

Each year, personally solicit 80-100 new prospects to be high-level members.

➤ **Mail Campaign:**

All potential donors who are not part of the Rolodex effort will be solicited by mail to become members. The Individual Gifts Committee arranges for Rolodex people not personally solicited to receive letters with hand-written notes from people they know asking them for a high-level gift ("Please join me as a Patron-level member ..."). The committee identifies an additional 90-100 prospects to receive personal notes.

Solicit all mailing list prospects for membership in the spring. Solicit them again in the fall if they have not signed up. Ask everyone to give a Christmas gift to the Company in December, and ask everyone to help sponsor a dancer in March. That way, each prospective donor will receive at last 3 direct solicitations a year. (This does not include special event solicitations.) Each year, send personal notes to additional 125-150 new prospects.

**Telephone Follow Up:**

The committee will organize telephone follow up for all prospects who received personal notes but who did not respond. Timing will be the first week of the month following the month of the mailing. Note: to encourage a better response, ask the volunteer callers to start calls with a "thank you" for past support and/or participation.

**Staff Time:**

Executive Director:	10 days to work with volunteers.
Development Associate:	60 days of coordinating, motivating, following up and record-keeping.
Administrative Assistant:	15 days of list & letter preparation.

**Board Time:**

Individual Gifts Committee:	Attend 5 performances with guests.
Members ( <i>each</i> ):	4 hours for personal solicitations, 2 evenings for telephoning.
Chair ( <i>in addition to above</i> ):	10 Hours for calls to board members to create Rolodex fundraising list.
Board Members ( <i>each</i> ):	Attend 2 performances with guests. Two evenings for telephoning.
Solicitation calls as appropriate.	

**Direct Costs:**

Office Supplies & Mailings: \$3,800 Receptions: \$1,850 160 Complimentary Tickets

<b>Projected Income:</b>	<u>2004-05</u>	<u>2005-06</u>	<u>2006-07</u>	<u>2007-08</u>
Rolodex	\$14,000	\$25,000	\$35,000	\$48,000
Mail & Phone	\$ 6,000	\$ 9,750	\$13,500	\$18,500

*(The plan is to have nearly 400 high-level donors by 2007-08, assuming we keep cultivating current donors as we add more.)*

**Special Fundraising Event:****Plan:**

Establish a Gala performance and dinner as annual Valentine's Day Social Event.

**Strategy:**

We have recruited a former President of the Junior League to the board specifically to establish this event as an important community affair. She will set up a Valentine's Day Committee recruited from young couples on the subscription list.

**Staff Time:**

Executive Director:	2 weeks for the first year, 1 week each year thereafter
Administrative Assistant:	2 months
Secretary:	3 weeks
Part-time Help:	3 months

**Volunteer Time:**

Chair:	1 Day a week - 1st year, 5 hours a week thereafter
18 Committee Members:	4 hours a week each (9 couples)

**Direct Costs:**

Includes artist fees, food, flowers, office supplies, publicist, decorations, part-time help, printing, etc.

First Year: \$82,000 Each Year thereafter: \$60,000

**Timetable:**

Establish Committee in January, 13 months ahead of the Valentine's Day event, so each new Committee can analyze the event prior to the one for which they are responsible.

<b>Projected Net Income:</b>	<u>2004-05</u>	<u>2005-06</u>	<u>2006-07</u>	<u>2007-08</u>
	\$19,000	\$38,000	\$46,000	\$55,000

## **Local Government:**

### **Plan and Rationale:**

Our increased programming of local groups has strengthened our image with local politicians. We have recruited a new board member who was formerly a popular County Commissioner to lead a lobbying effort to solicit the County Commissioners for County funding.

### **Strategy:**

Ask County to match City support. Form ad-hoc board committee of 6 members to lead effort to solicit County Commissioners and City Council. Screen subscribers to see if any elected officials attend our programs; involve them in the lobbying effort.

### **Staff Time:**

Executive Director: 7 Days  
Administrative Assistant: 10 Days

### **Board Time:**

6 Board members: 12 hours each for meetings, reception, phone calls, visits.  
Committee Chair: 1 day a week (6 weeks) + 12 hours.  
Volunteer Time: 15 volunteers to coordinate letter-writing campaign.

### **Direct Costs:**

Office supplies & postage: \$550 Reception: 600 56 complimentary tickets

<b>Projections:</b>	<u>2004-05</u>	<u>2005-06</u>	<u>2006-07</u>	<u>2007-08</u>
City	\$14,000	\$14,000	\$14,000	\$14,000
County	\$ 7,000	\$ 9,000	\$11,000	\$14,000

## **State Arts Commission:**

### **Plan and Rationale:**

Our programs are proving to be quality presentations, and the comments of State Commission staff have changed in tone from skeptical to enthusiastic. However, because decreased funding is making less money available for grants, we project a decrease in support from the State Arts Commission.

### **Strategy:**

Continue to invite State staff to performances with personal invitations followed up by phone calls. Continue to offer complimentary tickets to State Arts Commission board members. Start inviting staff and board to special cultivation events. Submit grant requests on a timely basis.

### **Staff Time:**

Executive Director: 3 Days  
Development Associate: 8 Days

### **Volunteer Time:**

Board Chair: 6 Hours

**Direct Costs:**

Minimal; complimentary tickets

<b>Projected Income:</b>	<u>2004-05</u>	<u>2005-06</u>	<u>2006-07</u>	<u>2007-08</u>
	\$10,000	\$8,000	\$8,000	\$8,000

# **Fundraising Plan Template**

## **Board Solicitation**

Name of Organization: \_\_\_\_\_

Period of Fundraising: \_\_\_\_\_

Goal of Fundraising Drive: \_\_\_\_\_

Plan and Rationale:

Strategy:

Staff Time:

Board Time:

Direct Cost:

Timetable:

Projected Income:

First Year

Second Year

Third Year

Fourth Year

Fifth Year

## **Individual Gifts Solicitation**

Plan and Rationale:

Strategy:

Methods:

Staff Time:

Board Time:

Direct Cost:



## Timetable

Projected Income:

First Year

Second Year

Third Year

Fourth Year

Fifth Year

## **Local Public Money**

Plan and Rationale:

Strategy:

Staff Time:

Volunteer Time:

Board Time:

Direct Costs:

Projected Income:

Source 1:

First Year

Second Year

Third Year

Fourth Year

Fifth Year

Source 2:

First Year

Second Year

Third Year

Fourth Year

Fifth Year

Source 3:

First Year

Second Year

Third Year

Fourth Year

Fifth Year

## **Private Money from Foundations and Corporations**

Plan and Rationale:

Strategy:

Staff Time:

Board Time:

Direct Costs:

Projected Income:

Source 1:

First Year

Second Year

Third Year

Fourth Year

Fifth Year

Source 2:

First Year

Second Year

Third Year

Fourth Year

Fifth Year

Source 3:

First Year

Second Year

Third Year

Fourth Year

Fifth Year

## **State and National Public Money**

Plan and Rationale:

Strategy:

Staff Time:

Board Time:

Direct Costs:

Projected Income:

Source 1:

First Year

Second Year

Third Year

Fourth Year

Fifth Year

Source 2:

First Year

Second Year

Third Year

Fourth Year

Fifth Year

Source 3:

First Year

Second Year

Third Year

Fourth Year

Fifth Year

## **Special Fundraising Event**

Plan:

Strategy:

Staff Time:

Volunteer Time:

Board Time:

Direct Cost:



## Timetable

Projected Income:

First Year

Second Year

Third Year

Fourth Year

Fifth Year

# Donor Profile Template

For Internal Use Only

## Donor Name:

\_\_\_\_\_  
(Corporation/Foundation/Individual)

Address:

\_\_\_\_\_

City, State, Zip:

\_\_\_\_\_

Phone 1:

PHONE 2:

\_\_\_\_\_

Email:

\_\_\_\_\_

## Contact Information:

Primary Contact: \_\_\_\_\_ Phone: \_\_\_\_\_

E-mail: \_\_\_\_\_

President/Chairman of the Board: \_\_\_\_\_ Phone: \_\_\_\_\_

E-mail: \_\_\_\_\_

Corporate Contributions Coordinator: \_\_\_\_\_ Phone: \_\_\_\_\_

E-mail: \_\_\_\_\_

## Individual Donor Information:

Nicknames(s) \_\_\_\_\_

Individual donor's birth dates: Hers \_\_\_\_\_ His \_\_\_\_\_

Children names \_\_\_\_\_

Planned Giving Prospect \_\_\_\_ Yes \_\_\_\_ No

Current Donor Level \$ \_\_\_\_\_ As of \_\_\_\_\_

Lifetime Giving Amount \$ \_\_\_\_\_ As of \_\_\_\_\_

Donor Since \_\_\_\_\_ (year)

Known areas of interest in the your organization:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**Notes:** (relationship history, religious affiliations, private club memberships, board affiliations, family history, etc.)

\_\_\_\_\_

\_\_\_\_\_

# Sample Contribution Pledge Form

XYZ ART ORGANIZATION  
PO Box 1234, Some City, Kansas 69999  
<http://www.xyz.org>

## CONTRIBUTOR INFORMATION (your personal information is kept confidential)

Last Name: \_\_\_\_\_, First Name: \_\_\_\_\_  
MI: \_\_\_\_\_  
Street Address: \_\_\_\_\_ City: \_\_\_\_\_ State \_\_\_\_ Zip \_\_\_\_\_  
Telephone Numbers: Home (\_\_\_\_\_) \_\_\_\_\_ Work: \_\_\_\_\_  
(\_\_\_\_\_) \_\_\_\_\_  
E-mail \_\_\_\_\_  
Address: \_\_\_\_\_

☛ *I would prefer that this contribution and/or my name be kept confidential. Thanks!*

## DONATIONS

### A ONE-TIME DONATION, IN THE AMOUNT OF:

\$5,000 \$2,500 \$1,000 \$500 \$100 \$50 Other: \$ \_\_\_\_\_

### A REPEATING DONATION, AS FOLLOWS:

A sum of \$ \_\_\_\_\_ Once Every Month Quarter Year, amounting to a Total of \$ \_\_\_\_\_

### MATCHING CONTRIBUTIONS

Does your employer match donations? YES / NO

**Please enclose a signed Matching Donation Form from your employer if applicable**

## METHOD OF PAYMENT

Check enclosed, Please make checks payable to "XYZ Art Organization"  
Please bill my credit card: Card type: Visa Mastercard American Express  
Discover

Account number: \_\_\_\_\_

Expiration Date: \_\_\_\_\_

Securities or stocks. Please call 800/777-8989 or email to [stock@xyz.org](mailto:stock@xyz.org) for details.  
Contact me

## NOTES

- Contributions to the XYZ Art Organization are deemed charitable under section 501(a) of the internal revenue code as an organization described in Section 501(c)(3). U.S. Federal Tax ID 761111111. Please consult your accountant for any clarifications.
- Payments must be received before the end of the year to be eligible for a tax deduction in that year.
- There is no minimum contribution amount.
- For more information please visit [www.xyz.org](http://www.xyz.org) or call 1-800/777-8888 or write to [info@xyz.org](mailto:info@xyz.org)

Please forward completed form and payment to:

**XYZ Art Organization, PO Box 1234, Some City, Kansas 69999 or fax to 555/666-7777**

**Would you like to volunteer your time, resources, or ideas to XYZ Art Organization? Yes/No**  
**Please call me!**

## Membership Card Template

Membership cards allow your constituents to get the most from membership. The card below allows you to understand how memberships can work for you.

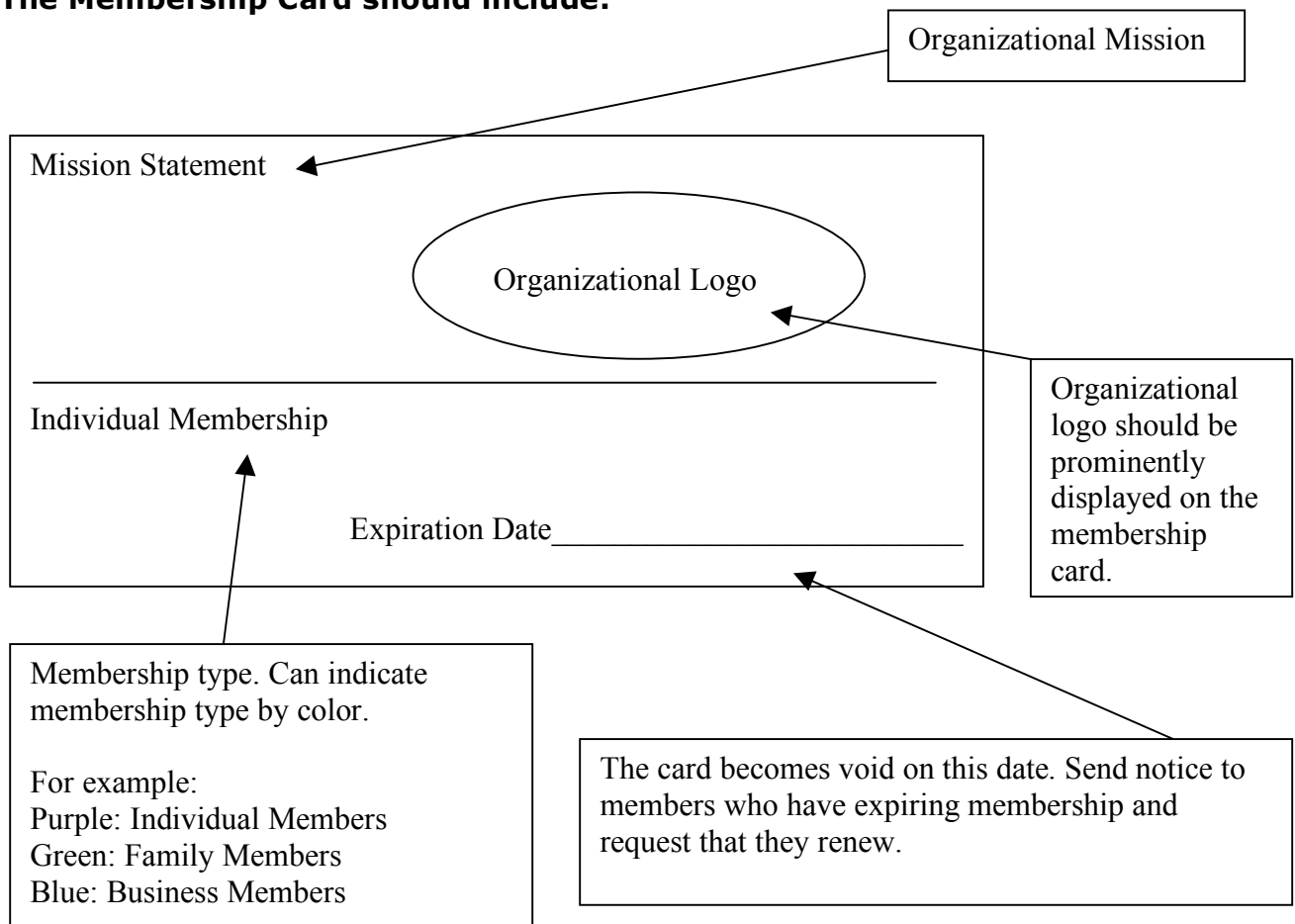
### Information to include with the card when it is distributed:

When visiting us, please make sure you have your card to get free admission or the 10% store discount. You must have your card.

Membership benefits are only extended to the person whose name appears on the card. Family membership includes adult parents/guardians and minor children. Membership is non-transferable.

Membership cards with expired dates will not be honored. Please make sure your membership is kept up to date. Thank you!

### The Membership Card should include:



## **Sample Benefits for Underwriters**

Corporation or businesses that provide major funding to underwrite an event can be recognized with all or some of the following:

### **Print**

- Corporate logo on all event ticket envelopes
- Corporate logo recognition as supporter on all print advertisements
- Corporate logo recognition as supporter on direct mail pieces and poster (distributed throughout the community)
- Recognition as supporter in all regional and national press releases for the program or event
- Corporate logo recognition in program

### **Radio**

- Company mentioned as supporter in all radio advertisements for program or activity

### **Signage**

- Color corporate logo recognition as supporter on prominent signage displayed at the activity or event

### **Television**

- Corporate logo recognition as supporter on all television promotions and commercials

### **Other**

- Recognition as Season Supporter on organizational web site with hyperlink to corporate web site
- Projected corporate logo during intermission on front wall of theater (marquee-style)
- Free tickets to the program or event
- Listing as supporter in invitations for special events linked to the program or activity

*Note: If seeking multiple levels of support, arrange benefits accordingly. Television is typically the best value, followed by radio and then print.*

## Sample Cover Letter

Date

Name

Title

Corporation Name

Address

City, State, Zip

Dear Mr./Ms. \_\_\_\_\_ :

Please find enclosed the request in the amount of \$ dollar amount from organization name . This funding will assist organization name in bringing project name to the community of name of community.

This special initiative will provide performances and educational workshops for number families as well as providing a unique opportunity for your organization members to receive professional development training provided by an established professional arts organization. Organization name staff members will be available for one-on-one consultation with board members, sharing tools and strategies that have proven successful in presenting performances. This project is targeted to reach number people, more than \_\_\_\_% of who have never seen a live professional ballet performance before.

Name of project is specifically designed for small to mid-size Kansas communities and name of organization is committed to securing this program for our community. The educational benefits will be widespread and long lasting; from young children participating in arts workshops on-site in their school to key community members strengthening their marketing, outreach and fundraising skills.

This opportunity will bring high-quality professional arts programming to our community and increase our capacity to successfully present subsequent arts programs. A partnership with corporation name will be instrumental in securing this valuable opportunity for our community and we appreciate your consideration of this proposal.

Yours sincerely,

Name

Title

## Sample Follow-Up Letter

Date

Prospective corporate contact name

Title

Company name

Address

City, State, Zip

Dear Mr./Ms. \_\_\_\_\_ ;

I am writing today to follow up on our recent telephone conversation regarding your company's sponsorship for name of activity or event, a program of name of organization. The opportunity to support activity or event provides describe benefits to corporation or business, as well as visibility, aligning corporation name with organization name. I would like to invite your company to participate in this exciting event.

Through the very valuable corporate support for organization name receives, we are able to enhance and foster what matters most to organization: reflect pertinent parts of mission or vision. The investment by corporation name would provide the opportunity to further develop these components.

Enclosed are supplemental materials detailing the marketing and advertising benefits to our supporters. Please contact me at your direct line, if you have any questions. Thank you for your consideration of these materials. I look forward to the opportunity to develop a long-lasting partnership with prospective corporation's name.

Sincerely,

Name

Title

Enclosures:

List all enclosed materials

## Sample Thank-You Letter

Date

Name

Title

Company Name

Address

City, State, Zip

Dear Mr./Ms. \_\_\_\_\_ :

Many thanks for your most generous gift of amount or in-kind contribution to your organization name, which we received in our office on date. In compliance with the tax code of the Internal Revenue Service, we confirm that you received no goods or services of monetary value from company name in connection with this gift, making the above amount fully deductible for tax purposes.

As a result of company name's gift, your organization's name will be able to continue to give specific things that you can accomplish and relate these to your mission.

As acknowledgment of your gift, your company's name will be listed as it appears below. To make a change or correction, please contact contact person's name in your organization and phone number.

Once again, many thanks for your generous support. We are exceedingly grateful.

Sincerely,

Name

Title

**Official Corporation Name**

**Corporation Contact Name**

**Address**



# Sample Proposal

## Summary of Request

Program Title:            Organization Name  
                                 Project Name

Proposed by:            Contact Person  
                                 Title

Address:  
City, State, Zip  
Phone:  
Fax:  
Email:

Program Dates:

Amount of Request:

## Program Description

Program name is an organization name initiative that provides small to mid-size Kansas communities with quality arts programming, in-school arts education residencies and professional development for arts organizations and presenters.

Through this program, the organization name will provide the community(s) of name of community(s) with the following services:

- A public, family performance of *The Nutcracker* (for example)
- Two days of in-school educational residencies
- Docent (public-speaking) training for area schoolteachers and community members to help them prepare their students and the community for the family performance
- Professional development training for the presenting community organization (community organization name) in the areas of marketing and advertising, fundraising, special events, public relations, box office management and outreach programs

The goal of the program name initiative is to provide Kansas communities with quality arts programming and to utilize the experience of the organization name staff to ensure that the presentation of the events will be successful. Skills gained from the professional development offered are transferable and will allow the community organization name to plan and implement a comprehensive series of future arts events in our community.

## Program Implementation

Community organization name will complete a Community Profile, a series of assessments designed to determine the current strengths and challenges of the community. This profile will also allow us to design educational programs that are most relevant to the community.

Upon completion of the profile, the community organization name will receive a toolkit containing templates and guidelines for successful arts presentation in the areas of marketing and advertising, fundraising, special events, public relations, box office management, and outreach programs. The toolkit will be tailored for use in the community, and our staff will provide consultation for implementation. Community organization name members and organization name staff will work together to establish benchmarks for success in the area of fundraising, ticket sales and community involvement and response.

Four to six weeks prior to the public performance, organization name staff and dancers will visit our community and conduct two days of educational programming in area schools. Special workshops and programs will be provided for children in grades K-12. All the activities are highly interactive providing students with an opportunity to participate as well as observe.

Organization name staff will also meet with area teachers and community members, providing them with information about ballet and organization name's performance and giving them training in public speaking relative to this event. These community members will then begin a public speaking campaign designed to increase community awareness, interest and education about the upcoming performance.

The initiative will culminate with a public performance of *The Nutcracker* on dates and times.

This project will reach a total of number of people ranging from pre-K through adult. *(Here give a broad but realistic estimate that includes all participants including patrons who attend the performance, community members who participate in docent training, and your organizational representatives who participate in professional development training and school children who will participate in educational residencies. Project for a best-case scenario.)*

## Need Within the Community

*Use this area to describe the specific need or reason that organization name will benefit the selected community. Focus on past arts experiences – what has worked, what hasn't and why this initiative will be valuable to your arts organization and the community as a whole. Be specific as possible.*

*As this initiative has a strong education component and many funders will respond to this aspect, it is important to refer to the important role that the arts play in education. There is some excellent data now available that supports this and it would be helpful to include it.*

Suggested resources:

***Champions of Change: The Impact of Arts on Learning*** (President's Committee on the Arts and Humanities)

*Americans for the Arts*

*Alliance for Arts Education*

## **Evaluation**

Evaluation for this program will come from several points:

- Staff and organization name will evaluate the success of the initiative based upon the benchmarks they established at the outset.
- Opinion surveys will be distributed to community participants, requesting response to all areas including marketing and advertising campaigns, educational programs, special events and public performance.
- Opinion surveys will be distributed to organization members requesting responses to the effectiveness of the professional development training.

Evaluation benchmarks include:

- Ticket sales
- Level of financial support
- Community awareness and involvement
- Student and teacher participation in educational programs
- Effectiveness and transferability of professional development skills


## **Key Staff**

*Include a short biography of organizational key staff (either executive director or board officers).*

## Sample Budget

*Most applications will require you to present a budget showing the projected expense and revenue associated with your project. It is a good rule of thumb to have applications pending that will total 4 times your needed revenue. Many foundations will not meet your full request. A budget is best presented in a spreadsheet format.*

*The figures in this column are fictional.  
Replace them with your actual budget figures*



### Expenses

Organization Name fee	\$17,000.00
Theater rent	\$2,500.00
Sound equipment	in-kind
Lighting rentals	\$1,200.00
Theater crew	\$2,500.00
Theater staff (front of house)	\$1,000.00
Paid advertising	\$1,200.00
Printing:	
Posters	in-kind
Fliers (lay-out and printing)	\$350.00
Programs (lay-out and printing)	\$450.00

<b>Total Expenses</b>	<b>\$26,200.00</b>
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### Earned Revenue

Ticket sales (avg. ticket price X # of seats sold)	\$18,000.00
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### Contributed Revenue

Foundations	\$3,000.00
Corporations	\$3,000.00
Individual	\$2,000.00
Government	\$1,200.00
Touring roster	\$1,500.00

<b>Total Revenue</b>	<b>\$28,700.00</b>
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\$2500 profit will be restricted for use in presenting future performing arts events

*In general, revenue should equal expense but, in the case of this initiative, the goal will be for presenters to show some profit to be held in reserve for the next performing arts event for the community.*

# Fundraising Events Template

This document presents guidelines and suggestions for an ideal, large-scale, fundraising event. The timeframe is approximately twelve months.

*This template can be modified to work for a smaller event.*

## Approaching Your Project Sensibly

The credibility of your organization will be on the line in the eyes of the community. Considering all the potential challenges is very important. Consider these issues and suggested solutions.

1.     **Issue:** Finding reliable event chairs with plenty of time and energy.  
          **Suggestion:** Engage community leaders. Ask those passionate about your organization to take on the task. If they decline, ask for their assistance in identifying an alternative candidate. People are flattered when you tell them you need their "expert advise."
2.     **Issue:** Covering event expenses prior to collecting revenue  
          **Suggestion:** Identify and solicit event sponsors immediately.
3.     **Issue:** Promoting your event within the community  
          **Suggestion:** "Partner" with the local media to promote your event and cause. Get printing costs donated for invitations, etc.
4.     **Issue:** Feeling overwhelmed with the details of an event  
          **Suggestion:** Plan early, stay organized and leverage key relationships with those that have resources and expertise.

## Essential Volunteers/Committee Chairs

**Event Chair(s)** - oversees all activities relating to event from start to finish.

*General Duties:*

- Oversee the event at-large
- Generates budget
- Appoints committee chairs
- Determines theme
- Maintains communication with staff or key member of the organization

*Most of the detail work will stay with the specific committee chairs below*

**Corporate Relations/Sponsorships** - helps raise necessary seed money for early event expenses and help event tickets or tables to corporations

*General Duties (strong collaboration between Event Chair(s) on this):*

- Identify potential sponsors/donors: corporate and individual
- Determine possible benefits for sponsors with the Event Chairs- (most sponsors will want something in return for their investment whether it's free tickets to the event or marketing and advertising for the company)
- Deliver the promised benefits to sponsors
- Identify potential sponsors for the event *(be sure to consider pro bono sponsors which will help alleviate expenses)*
- Draft strategy for acquiring sponsors
- Understand what you need and what you plan to give back to the sponsor (benefits plan)
- Generate all necessary paperwork
- Understand the traditional giving cycle of your target sponsor—don't ask for money too late! Research your prospects.

**Volunteer Coordinator Chair** - recruits and energizes volunteers for all committees

*General Duties:*

- Identify volunteer needs for each committee
- Communicate regularly with volunteers on behalf of the Event Chair
- Recruit more volunteers as necessary
- Delegate tasks on the day of event

**Media and Public Relations Chair** - promotes the event

*General Duties:*

- Develop the language for promoting the event
- Identify media sponsors
- Work with Corporate Relations/Sponsorship Chair regarding press releases
- Communicate through various methods (TV, print, radio, web, email)

**Other areas to consider once "core" committee members are determined and appointed.** (Details covered in timeline.)

- **Logistics Committee Chair** - oversees the details and the flow on the day of the event
- **Invitation Committee Chair** - oversees the designing and mailing the invitation
- **Decorations Committee Chair** - determines necessary decorations based on theme
- **Auction Committee Chair** - organizes all aspects of auction
- **Menu Committee Chair** - works with the caterer on food and drink choices
- **Entertainment/Program Committee Chair** - determines and contracts entertainment (bands)

## Special Events Timeline

### Twelve Months Before Event:

- Appoint Event Chair(s)
- Determine the purpose of your event. (Fundraiser or donor development)
- Establish a theme for the event
- Establish the budget: expenses and revenue  
Your event can be priced to attract fewer people at a higher price, or more people at a lower price. Sometimes exposing the organization to a broader group of people is more important than reminding your loyal patrons how wonderful you are. Be sure to consider these costs:
  - Venue & service
  - Labor
  - Publishing costs
  - Special equipment
  - Entertainment
  - Decorations
  - Acknowledgment
- Event chairs determine and appoint Key Committee Chairs:
  - Corporate Relations/Sponsorships Chair (immediately)
  - Volunteer Coordinator Chair (no later than 9 months before event)
  - Media & Public Relations Chair (no later than 7 months before event)
- Event Chair(s) - Appointing specific committee chairs helps distribute the work. However, event chairs guide the overall purpose and vision of the event and cannot avoid working closely with each chair.
- Schedule timeline:
  - Create a timeline highlighting the important aspects of the event
  - Determine absolute deadlines and plan accordingly to achieve them.  
(Example:  
*If reservations must be received by Nov. 24, the invitation must be mailed 4 to 5 weeks earlier. Furthermore, the invitation needs to be to the printer 2 weeks before that, and design time can take up to 3 weeks. So far, this is 9 to 10 weeks out from date event)*
- Determine guest list. (This will influence price per person costs.)
  - Be sure your guest list comprises appropriate people that will realize the purpose of your event. (Example: the more ritzy the event, the more affluent the guests.)
  - Start spreadsheet tracking: formal names, addresses, and phone numbers. This is the start of your guest list.
  - Use names from the organization's general patron list.

- Determine Where and When
  - Establish location, time & date (this is vital to the planning)
  - Book venue: make deposits and sign contracts if necessary

### **Nine Months Before Event:**

- **Initial committee meetings begin**  
 Appoint last Committee Chairs:
  - Logistics Committee Chair
  - Invitation Committee Chair
  - Decorations Committee Chair
  - Auction Committee Chair
  - Menu Committee Chair
  - Entertainment/Program Committee Chair

*Individual committees begin to plan the details of each area and adhere to budget constraints determined by Event Chair(s).*

- **Logistics Committee**
  - Determine flow and timing of event.
  - Determine volunteers needed.
  - Brainstorm ideas for new and unique experiences.
- **Invitation Committee**
  - Determine style (in-house? paper choice? professional print job?)
  - Choose design Identify printer.
  - Choose and order paper. Be sure paper to be used will allow for the desired effect.
  - Determine whether you will mail invitations first class or bulk.
- **Decorations Committee**
  - Begin to determine theme.
  - Start cost evaluations.
- **Auction Committee**
  - Identify financial goal.
  - Determine milestones for success (Set realistic goals and evaluate them regularly.)
  - Get lists of past merchant donors.
  - Divide list among committee.
  - Design a solicitation mailing for auction donations.

*If goal is large:*

  - Include: letter, brochure, return envelope.
  - Determine postage needs.
  - Be sure to use a clean address list.

*If goal is modest:*

  - Identify desired items and donors.
  - Divide solicitations among committee members based on their personal relationships.
  - Start asking.



- **Menu Committee**
  - Start brainstorming on menu ideas.
  - Work with caterer on costs.
  - Some caterers may invite you to taste a sample of the menu options to help with your decisions.
- **Entertainment/Program Committee**

Determine amount of time available for entertainment before or during the event.

  - Determine use of band.
  - Identify band.
  - Check availability.
  - Book ASAP (Some bands require a deposit.)

Speaker/Auctioneer/Master of Ceremonies

  - Identify personality.
  - Check availability.
  - Book ASAP.
  - Start drafting script.
- **Corporate Relations/Sponsorships Chair**

Begin sponsorship solicitations.

  - Mail packets and meet potential sponsors in person.
  - Get high-powered, influential people involved in the ask.
  - Follow up bi-weekly until you get an answer.
  - If corporations are uninterested in sponsoring the event at-large, ask them to commit to purchase a table at the event or several tickets.

Event chair finalizes all deadlines in each committee and recruits volunteers for their committee.

### **Six to Seven Months Before Event**

- **Event Chair(s)**
  - Begin monthly meetings for all Committee Chairs (keep this a standing date to ensure attendance.)
  - Each committee reports progress and expresses needs.
  - Reconcile Budget.
  - Go over budget with the Committee Chairs keeping close tabs on what each Committee spends.
- **Corporate Relations/Sponsorships Chair**
  - Continue with sponsorship solicitations and table/ticket sales.
  - Start to collect sponsor logos for use in P.R. and signage.
  - Ask sponsors to participate in volunteering for event.
- **Media and Public Relations Chair**
  - Write press releases.
  - Continue to hold monthly committee meetings.
  - Include Date, Time, Location, name of organization holding event, volunteer groups involved, purpose of event, celebrities involved, contact information,

sponsors.

- **Auction Committee Chair**
  - Actively solicit large auction donations (items such as cars, trips, art, etc. usually require formal requests).

### **Five Months Before Event**

- **Event Chair(s)**
  - Start early ticket sales with board members and high-end donors- use their names on the invitation later (be sure to get their permission.)
  - Send letter with benefits of early purchase if necessary.
  - If you plan to list on invitation, be sure to list a deadline for printing purposes.
  - Continue to hold monthly committee meetings.
  - Go over budget with the Committee Chairs keeping close tabs on what each Committee spends.
- **Media & Public Relation Chair**
  - Fax press releases to all newspapers, radio stations & TV stations.
- **Corporate Relations/Sponsorships Chair**
  - Mail second invoices to corporate sponsors (if necessary.)
- **Invitation Committee Chair**
  - Plan invite to drop in the mail 4-5 weeks before the event*
  - Begin working with invitation design.
  - Choose and order paper (be sure paper to be used will allow for the desired effect.)
  - If you are using bulk mail be wary of busy mailing times: Christmas, Mother's Day, Valentine's Day; this could slow down your mailing.
  - Including a return envelope will make the RSVP process easier for guests, but will increase expense of invitation.
  - Mailing envelope should have a "return service requested" statement. This will be more expensive, but all erroneous addresses will be returned to organization for correction.
  - Don't forget to use your organization's logo if possible.

### **Four Months Before Event**

- **Event Chair(s)**
  - Begin cleaning up mailing list for invitations.
  - Visit event venue.
  - Continue holding monthly committee meetings.
  - Go over budget with the Committee Chairs keeping close tabs on what each Committee spends.
- **Corporate Relations/Sponsorship Chair**
  - Report your progress to sponsors.
- **Decoration Committee Chair**
  - Order necessary decorations.

- Finalize decoration details with Event Chair.
- • Order necessary party favors.
- **Auction Committee Chair**
  - Start collecting donated auction items.
  - Keep an excel spread sheet going with all collected items and information.
  - Make sure to keep all props to return to the donors.

### **Three Months Before Event**

- **Event Chair(s)**
  - Start bi-weekly Committee meetings.
  - Go over budget with the Committee Chairs keeping close tabs on what each Committee spends.
- **Media and Public Relation Chair**
  - Fax second round of press releases.
  - Report progress to sponsors.
  - Include any new/ early ticket or table buyers.
- **Logistics Committee Chair**
  - Get volunteers committed for the day of the event.
  - Clarify any parking issues that might be attached to using the venue.
- **Invitation Committee Chair**
  - Finalize invitation designs- last chance for early sponsor opportunities and tickets purchases!
    - Send to printer within two weeks.
    - Allow one week for proofing and approval by committee and organization.
    - Start early label printing if necessary.
- **Auction Committee Chair**
  - Continue to collect the auction items.
  - Determine bidding procedure for larger items:
    - Live - be sure to book an auctioneer.
    - Sealed - start promoting items to guests.
    - Silent - Generate bid sheets and determine minimum bids on all items.
  - Send out booklet of items collected before the event.
- **Menu Committee Chair**
  - Begin to focus on menu options.
  - Work closely with caterer.
  - Consider special dietary needs of guests.
  - Make menu match the season.
  - Schedule time for tasting of the menu if necessary.
- **Entertainment/Program Committee Chair**
  - Final considerations
  - Sound systems.
  - Transporting heavy objects.

- Get all information to the invitation committee for publication.

### **Two Months Before Event**

- **Event Chair(s)**
  - Continue with bi-weekly committee meetings.
  - Go over budget with the Committee Chairs keeping close tabs on what each Committee spends.
- **Invitation Committee Chair**
  - Get invitation volunteers together to assemble.
  - Check on available postage first class bulk.
  - Mail invitations.
- **Entertainment/Program Committee**
  - Confirm entertainment 1 month to 2 weeks before the event.
- **Event Chair**
  - Begin collecting reservations.
  - Seat guests according to their priority. This can be determined by donation level, profile in the community, etc.
  - Final arrangements made and approved for decorations.
  - Reconcile budget.
  - Volunteer coordinator should meet with each committee chair to determine needs.
- **Corporate Relations/ Sponsorship Chair**
  - Start to design signs for sponsors.
    - Be sure to use the most updated logo.
  - Report progress to sponsors.
- **Media and Public Relations Chair**
  - Send another round of press releases.
  - Be sure to get local society reporters to cover the event (you may need to comp their tickets.)
- **Decorations Committee Chair**
  - Order flowers.
  - Make sure decorations have been finalized.
- **Auction Committee Chair**
  - Continue to collect auction items.
  - Print all necessary bid sheets for the auction.
  - Mail mini-auction booklet to confirmed guests to promote items (if budget allows.)
- **Menu Committee Chair**
  - Confirm menus with the caterers.
    - Be sure all rentals have been requested.
    - Make sure all beverages are set including non-alcoholic beverages.

### **Week of Event**

- **Event Chair**
  - Fill empty seats with potential donors/sponsors, dedicated committee members or staff from the organization.
  - Finalize the seating chart.
  - Call each committee chair to check status.
- **Logistics Committee Chair**
  - Confirm volunteers - tell them where to be and when.
- **Decoration Committee Chair**
  - Coordinate final plan to deliver decorations.
- **Auction Committee Chair**
  - Account for all auction items and bid sheets.
- **Menu Committee Chair**
  - Confirm catering.
- **Entertainment/program Committee Chair**
  - Confirm entertainment.
  - Confirm arrival times.
    - Emcee.
    - Entertainment.
    - Volunteers.

### **Day Before Event**

- **Event Chair**
  - Print out guest list in alphabetical order for the check-in volunteers.
  - Generate checks for entertainment and caterer if required.
- **Media and Public Relations Chair**
  - Deliver signage to event site (any other items that can be delivered early should arrive in the late afternoon.)
- **Entertainment/Program Committee Chair**
  - Be sure all necessary sound equipment is delivered early on the day of the event in case of problems.

### **Day of Event**

- **All Event & Committee Chairs**
  - Arrive for set up.
  - Work in shifts.
  - Be sure all aspects are in place before leaving to get ready.
  - Return to the event (dressed for the evening) 45 minutes before guests arrive.
- **Logistics Committee Chair**
  - Have volunteer coordinator lead his/her troops.
  - Keep timeline close at hand all evening to check the status.

- **Decoration Committee Chair**
  - Check the quality of the decorations.
- **Menu Committee Chair**
  - Walk through event one final time with the caterer.
- **Entertainment/Program Committee Chair**
  - Have feature entertainment and speakers in place 20 minutes before you need them.

### **Post-event Follow-Up**

Take time to evaluate your event especially if you plan to repeat it! Don't forget one of the most important aspects of your event: saying "thank you" to everyone who participated in the event.

- **Event Chair**
  - Reconcile budget.
    - Collect any outstanding money or pledges.
    - Mail or deliver all expenses from event.
  - Send thank you notes to all committee members.
  - Send a report to all sponsors with a thank you.
    - Consider having a follow-up thank you party for everyone who participated.
  - Send follow-up communications to all special guests encouraging them to continue to support the organization.
  - Collect all articles and press clippings.
  - Meet with individual committees 2 to 5 days after the event for evaluation.
    - Discuss all successes and challenges of event.
    - Offer suggestions to remedy problems.
    - Offer explanations as to why certain things did and did not work.
    - Evaluate whether the event served its purpose.
    - Decide whether you would do the event again.
  - Save all notes and compile a notebook for reference to future chairs.
    - Include all budget to actual information.
    - Include receipts.
    - Include planning notes from each committee chair.
    - Include all press releases.
    - Include sample letters sent to sponsors.
    - Include sample invitations.
    - Include guest lists.

## **Part VI: Articles**

- **The Ten Most Important Things You can Know About Fundraising – [www.grassrootsfundraising.org](http://www.grassrootsfundraising.org)**
- **Ten Necessities for Raising Money in the 21<sup>st</sup> Century – [www.afpnet.org](http://www.afpnet.org)**
- **The 20 Biggest Fundraising Mistakes, Parts I & II – [GuideStar.org](http://GuideStar.org)**
- **125 Best Practices and Great Ideas – [www.hartsookcompanies.com](http://www.hartsookcompanies.com)**
- **Fundraising: Preferred Practices – [www.fastennetwork.org](http://www.fastennetwork.org)**
- **Building Good Relationships with Donors Starts with You – [www.grassrootsfundraising.org](http://www.grassrootsfundraising.org)**
- **The Patron Gets a Divorce – New York Times Online**

## **Articles and Additional Resources**

- The Ten Most Important Things You can Know About Fundraising – [www.grassrootsfundraising.org](http://www.grassrootsfundraising.org)
- Ten Necessities for Raising Money in the 21<sup>st</sup> Century – [www.afpnet.org](http://www.afpnet.org)
- The 20 Biggest Fundraising Mistakes, Parts I & II – [GuideStar.org](http://GuideStar.org)
- Fundraising: Preferred Practices – [www.fastennetwork.org](http://www.fastennetwork.org)
- Building Good Relationships with Donors Starts with You – [www.grassrootsfundraising.org](http://www.grassrootsfundraising.org)
- The Patron Gets a Divorce – New York Times Online



## **Additional Resources**

### **Books**

- *Beyond Fund Raising* by Kay Sprinkle Grace
- *Don't Just Applaud, Send Money* by Alvin H. Reiss
- *Fundamentals of Arts Management* edited by Pam Korza and Maren Brown
- *Fundraising Magic; 33.5 Strategies for Turning Board Members into Money Makers* by Robert G. Swanson
- *Nonprofit Kit for Dummies* by Stan Hutton and Frances Phillips
- *Successful Fundraising* by Joan Flanagan

### **Directories (can be found at your local library)**

- Directory of Kansas Foundations
- Foundation Fundamentals: A Guide for Grantseekers
- Foundation Reporter
- Funding Sources for Community and Economic Development: A Guide to Current Sources for Local Programs and Projects
- The Foundation 1000
- The Foundation Directory
- The Grants Register

### **Granting Foundations/ Agencies**

- Capital Federal Foundation
- Institute of Museum and Library Services
- Kansas Department of Commerce
- Kansas Gas Service
- Kansas Health Foundation
- Kansas Humanities Council
- Kansas State Historical Society
- Koch Industries
- National Endowment for the Arts
- National Endowment for the Humanities
- Payless ShoeSource
- Spring Foundation
- Westar Energy

### **Online Resources**

#### **Local – Kansas**

**Kansas Arts Commission**

<http://arts.ks.gov>

*KAC serves artists, nonprofit organizations, schools and government agencies through grants to support the arts in communities. Provides seminars, workshops and one-on-one consulting in business development, grantwriting, strategic planning, marketing and other areas of nonprofit arts management.*

**Kansasgrants.org**

<http://www.kansasgrants.org>

*Clearing house for Kansas grants*

**Kansas Health Foundation**

<http://www.kansashealth.org>

*The Kansas Health Foundation seeks to improve the health of Kansans through shaping policy, leadership initiatives, children's and public health.*

**Kansas State Historical Society**

<http://www.kshs.org>

*The mission of the Kansas Historical Society is to identify, collect, preserve, interpret, and disseminate materials and information pertaining to Kansas history in order to assist the public in understanding, appreciating, and caring for the heritage of Kansas. Offers research and preservation grants.*

**Kansas Museums Association**

<http://www.ksmuseums.org>

*The Kansas Museums Association's purpose is to create, foster and promote interest in, advancement of, and appreciation for museums of Kansas. Further, it is organized to increase and disseminate knowledge about the museum field and to encourage cooperation among museums and those interested in them.*

**Kansas Non-Profit Association**

<http://www.mainstreaminc.net/knpa/>

*An innovative, supportive organization that strives to serve a broad range of nonprofit organizations; is a source of expertise and information; assists agencies to be more accountable, credible, and effective; and demonstrates capacity-building in the provision of services to others.*

## **Regional – Midwest**

**Midwest Center for Nonprofit Leadership**

<http://bsbpa.umkc.edu/mwcnl/>

*The mission of the Midwest Center for Nonprofit Leadership (MCNL) is to enhance the performance and effectiveness in the nonprofit sector through high quality community-oriented education, applied research, problem solving and service.*

## **National**

**American Arts Alliance**

<http://www.americanartsalliance.org>

*The American Arts Alliance is a national network of more than 4,100 members comprising the professional, nonprofit performing arts and presenting fields. Through legislative and grassroots action, the American Arts Alliance advocates for national policies that recognize, enhance and foster the contributions the performing arts make to America.*

**American Association for State & Local History**

<http://www.aaslh.org>

*Most history organizations in the United States are small, volunteer led and, often, volunteer staffed. They have small budgets and limited staff resources. AASLH is the national organization known for serving this special audience. AASLH has fashioned a roster of programs and services that are meeting members' needs and progressively advancing the goals and standards of the field.*

**American Association of Museums** <http://www.aam-us.org>  
*Helping to develop standards and best practices, gathering and sharing knowledge, and providing advocacy on issues of concern to the entire museum community. We are dedicated to ensuring that museums remain a vital part of the American landscape, connecting people with the greatest achievements of the human experience, past, present and future.*

**Americans for the Arts** <http://www.americansforthearts.org>  
*Provide extensive arts industry research, and information and professional development opportunities for community arts leaders via specialized programs and services, including a content-rich website and an annual national convention.*

**Association of Fundraising Professionals** <http://www.afpnet.org>  
*The Association of Fundraising Professionals (AFP) works to advance philanthropy through advocacy, research, education and certification programs. The association fosters development and growth of fundraising professionals and promotes high ethical standards in the fundraising profession.*

**Board Source** <http://www.boardsource.org>  
*BoardSource increases the effectiveness of nonprofit organizations by strengthening boards of directors through our highly acclaimed consulting practice, publications, tools, and membership program.*

**Charity Channel** <http://charitychannel.com>  
*The Charity Channel community is comprised of nonprofit sector professionals from around the world who volunteer their time, advice, information, tips and articles for the benefit of the community.*

**Chronicle of Philanthropy** <http://www.philanthropy.com>  
*Newspaper to the nonprofit world. Features information on grants and gift making, managing nonprofits, workshops and conferences, online discussions and employment opportunities.*

**Council on Foundations** <http://www.cof.org>  
*Provide the opportunity, leadership and tools needed by philanthropic organizations to expand, enhance and sustain their ability to advance the common good. Over 2,000 grantmaking foundations and giving programs worldwide are members of the Council on Foundations.*

**Free Management Library** <http://www.managementhelp.org>  
*The Library provides easy-to-access, clutter-free, comprehensive resources regarding the leadership and management of yourself, other individuals, groups and organizations. Content is relevant to the vast majority of people, whether they*

*are in large or small for-profit or nonprofit organizations. Over the past 10 years, the Library has grown to be one of the world's largest well-organized collections of these types of resources.*

**Grassroots Fundraising Journal** <http://www.grassrootsfundraising.org>  
*Grassroots Fundraising believes that fundraising is a critical and integral part of progressive social change. We also believe that anyone can learn fundraising. For both those reasons, we create and distribute accessible materials that teach people how to raise money.*

**Guidestar** <http://www.guidestar.org>  
*This simple search is for users who want to verify a nonprofit's legitimacy, learn whether a contribution will be tax deductible, view a nonprofit's recent Forms 990, or find out more about its mission, programs, and finances. Thanks to the generosity of a number of foundations, GuideStar Basic is available at no charge to users. GuideStar Select and Premium feature more search options and require a subscription.*

**League of Historic American Theaters** <http://www.lhat.org>  
*Promotes the rescue, rehabilitation and sustainable operation of historic theatres throughout North America. LHAT serves its members and those interested in historic theatre restoration with a wide range of programs and services to help people Enrich their professional skills, Increase their knowledge of historic theatres, Lead their communities to successful rescue, restoration and reuse of their historic theatres.*

**National Assembly of State Arts Agencies** <http://www.nasaa-arts.org>  
*NASAA works at the national, state and local levels to ensure that every individual has abundant opportunities to participate in the artistic experience; the arts play a valued role in the educational, economic and cultural well-being of our communities; the nation's artists and arts organizations are key partners in providing public benefits; and our nation's diversity is recognized and celebrated through the arts.*

**South Dakota Arts Alive Network** <http://www.sdarts.org>  
*The Arts Alive Network provides information for arts organizations and administrators, arts educators and students, legislators and policy makers, artists and performers, anyone interested in the arts and culture of and by South Dakotans.*